

2014-2015 Four Year Voter Record Maintenance

Webinar: June 3, 2015

Overview:

Four Year Maintenance postcards will be mailed to voters who registered on or before December 31, 2010, and who did not have a vote recorded in SVRS from January 1, 2011, through the 2015 Spring Election. The webinar will cover the process for managing postcards when they are returned to the clerk's office, including changing the voter status in the CRM (Electiondata.gab.wi.gov) 4 Year Maintenance module.

The Four Year Maintenance process is conducted every two years in the June following a General Election. The "4 year" in 4 Year Maintenance refers to the last time the person voted in an election. In other words, every 2 years the state sends postcards to voters who have not voted in 4 years.

Agenda:

1. Dates and deadlines
2. Overview of CRM (Electiondata.gab.wi.gov)
3. What to do when a voter returns the postcard
4. What to do when the post office returns a postcard
5. Exporting the 4 Year Maintenance list to Excel
6. Processes for "Special" circumstances
7. Questions and Answers

Materials:

A training .pdf document is available on CRM (under 4 Year Maintenance) and is also attached below.

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Four Year Voter Record Maintenance



Every two years, after November General Elections, all voters who have not voted within the past four years must be mailed a notice that their voter registration will be suspended. If a recipient does not respond within 30 days, their voter record in SVRS will be inactivated.



For the 2014/2015 Voter Record Maintenance, the G.A.B. will identify affected voters and send each one the required mailing. The return address on each postcard will be the voter's municipal clerk. If a recipient returns a postcard to the clerk requesting to remain an Active voter, the clerk will adjust their record in SVRS accordingly. Recipients who have a postcard returned by the post office as undeliverable will be inactivated when clerks record the mailing in SVRS or CRM.



Voters who have a changed name or address are instructed to not return the card, but instead re-register under their new name or at their new address.

Overview

Four-Year Maintenance consists of several steps:

1. Firstly, all voters who registered before 1/1/2011 but did not vote between 1/1/2011 and 12/31/2014 will be identified by the G.A.B. Their voter records will be changed from **Active – Registered** to **Active – Suspended (4 Years Notice)**. (The G.A.B. runs separate checks for voter participation in February 2015 and April 2015 to identify those who have voted, these are removed from list of voters sent postcards.)
2. Next, all **Active – Suspended** electors will be sent the required Notice of Suspension of Registration postcards.
3. The municipal clerk will receive postcards returned by the post office or by the voter. SVRS users will record the returned mailings themselves, and Reliers will forward copies of the postcards to their SVRS Providers on a weekly or bi-weekly basis. Relier clerks should speak to their SVRS Providers if they have questions about how often they should forward groups of returned postcards.
4. Thirty days after the postcards are sent, the G.A.B. will inactivate all electors who have not responded. Their status will be changed to **Inactive – 4 Year Maintenance**.
5. Municipal clerks should pull hard copies of the voter application for all electors that are changed to inactive status and attach the original returned postcard to the application. These may be destroyed four years (2019) after the change.

Notes

You can still record votes and send absentee ballots to voters who are Active - Suspended. If a suspended voter has a vote recorded in the 30 days between when they are sent the Notice of Suspension of Registration postcard and when they are scheduled to be inactivated, the G.A.B. will automatically change their status back to **Active – Registered**.

Confirm Sent Postcard

The G.A.B. will send each voter the Notice of Suspension of Registration postcard displayed below. Each recipient's record will be noted that the postcard was sent.

To verify that a voter has been sent a mailing:

1. Open the voter record.
2. Go to the **Activity** tab.
3. Enter the **Activity Type** of **Mailings**.
4. Click **Search**.
5. Click on the mailing record displayed in the upper grid, and the mailing's description and date sent will appear in the lower grid.

The screenshot shows the 'Activity' tab selected. The 'Between' filter is set to '3/25/2015' and the 'Activity Type' is set to 'Mailings'. A 'Search' button is visible. The results grid shows one entry: 'CITY OF MILWAUKEE - MAIN - 41251' with a date of '5/4/2011' and user 'jacobp'. Below the grid, the 'Details' section shows 'Mailing Type' as 'VOTMAIL', 'Form Description' as 'Notice of Suspension of Registration', 'Queued On' as '4/15/2015', 'Returned On' as '5/4/2013', and 'Response' as 'Returned - Contin...'.

Here is a sample of the outgoing half of the 2015 **Notice of Suspension of Registration** postcard.

The postcard is addressed to TERI LEHRKE at 400 LA CROSSE ST, LA CROSSE WI 54601-3374. It is marked 'OFFICIAL ELECTION MAIL' and 'RETURN SERVICE REQUESTED'. The recipient is identified as CITY OF LA CROSSE - WARD 14, LA CROSSE COUNTY, CONGRESSIONAL - DISTRICT 3. The notice states that voter registration will be suspended unless the voter applies for continuation within 30 days. It provides contact information for the Municipal Clerk, Andrew James Kranz, and the G.A.B. Help Desk.




NOTICE OF SUSPENSION OF REGISTRATION

You are hereby notified that your voter registration will be suspended, according to state law, for failure to vote within the previous 4-year period, unless you apply for continuation of your registration within 30 days. You may continue your registration by signing the statement on the other side of this postcard and returning it to your municipal clerk's office by mail or in person.

If you have changed your residence or changed your name, please contact your municipal clerk and complete a new voter registration form. Municipal Clerk contact information can be found on the G.A.B. website: gab.wi.gov/clerks/directory

If you have any questions regarding this notice please contact the G.A.B. Help Desk at (608) 261-2028 or gabhelpdesk@wi.gov.

Here is a sample of the return portion of the 2015 postcard, showing the **Application for Continuation of Registration**. The black print will remain the same on each card. Red print will change for each voter.

 <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 0 auto;">Return Postage Required</div>	<p>APPLICATION FOR CONTINUATION OF REGISTRATION I hereby certify that I still reside at the address listed below and apply for continuation of registration.</p> <p>ANDREW JAMES KRANZ 617 MAIN ST LA CROSSE WI 54601</p> <p>Signature: _____ Date _____</p> <p><small>If you have changed your residence within the State of Wisconsin, or changed your name, YOU SHOULD NOT SIGN the above statement and are directed to re-register at My Vote Wisconsin website: myvote.wi.gov. Choose your voter category. Enter your name and date of birth. Select Update Voter Information and complete the Voter Registration process.</small></p> <p>CITY OF LA CROSSE - 32246 <u>0019117063</u> Voter Registration ID</p> <div style="text-align: center;">  <u>13138154</u> Mailing ID </div>
<p>CLERK MUNICIPALITY NAME STREET ADDRESS CITY, STATE, ZIP CODE</p> <p style="text-align: center;"></p>	



All postcards will be returned to the municipal clerk. This includes municipalities that rely on their county or another municipality to provide SVRS services. In that case, the Relier clerk should keep all returned postcards and send them in groups to their SVRS Provider on a weekly or bi-weekly basis, or in one large batch if that is what their SVRS Provider prefers. SVRS Providers will follow the steps below to properly record the status of the returned postcards.

Process Returned Postcards

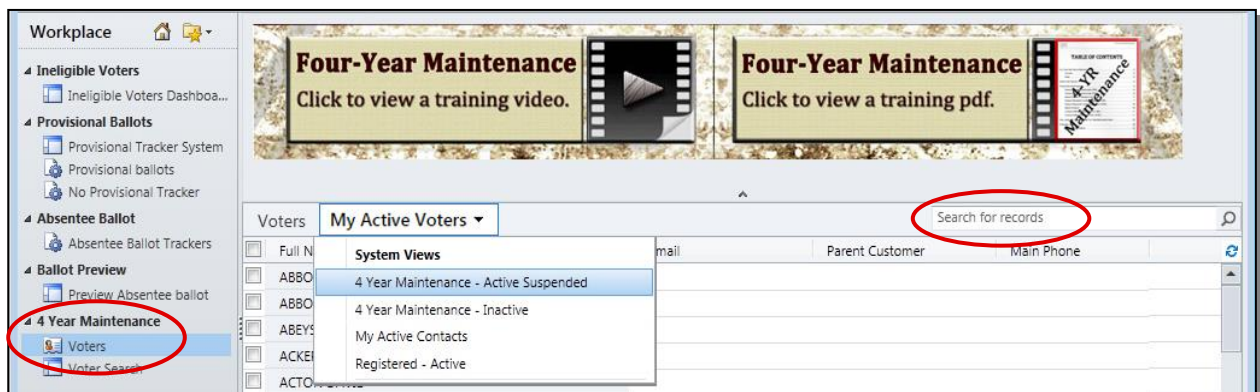
Four-Year Maintenance postcards will be returned by the post office because they are undeliverable or returned by the voter because they wish to remain registered. Postcards can be processed via SVRS or in a new, easier way through our Customer Relationship Management software (CRM). Please see how to access CRM at the end of this chapter.

Although we highly recommend using CRM to process postcards, we also provide instructions on how to process postcards in SVRS. These instructions can be found in the SVRS Manual on the G.A.B website.

Postcard Returned Undeliverable – Returned by the Post Office

Locate **4 Year Maintenance** on the main screen menu under **Workplace**.

1. Click on **Voters**.
2. Change the view **My Active Voters** drop-down to **4 Year Maintenance – Active Suspended**.
(The Active Suspended view allows users to monitor how many voters records need to be processed.)



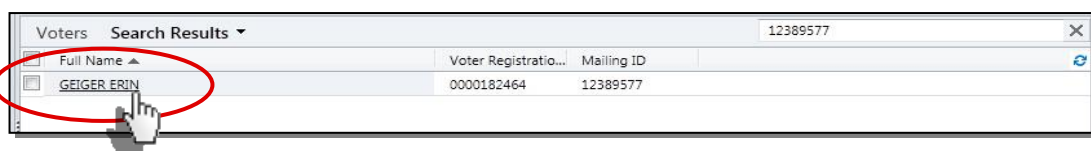
The Four-Year Maintenance training video and guide are available from this site.

3. Click in the **Search for records** field and enter the Four-Year Maintenance **Mailing ID**. The mailing ID number can be entered manually or scanned in from the postcard with a barcode reader. If you enter the number manually, you must then hit **Enter** on your keyboard to search the records. (Voter last names & registration numbers can also be searched.)



When you begin recording the mailing using a bar code scanner (or the keyboard), be sure to click inside the **Search for records** field.

4. Click on the voter's name to access the voter record.



5. A new window will open with the voter record. Change the **Reason** from Suspended (4 Years Notice) to **4 Year Maintenance**.
6. Choose **Save & Close**.

Voter: GEIGER ERIN - Microsoft Dynamics CRM - Windows Internet Explorer provided by State of Wisconsin

http://www.mad01627.svrs.wisstate.ac/GAB/main.aspx?etc=2&extraqs=%3f_gridType%3d%26etc%3d%26id%3d%257bC77E8DD7-5593-E211-80F8-0050568C2EE9%257d%26pagemode%3diframe%26prel

Wisconsin Election Management System

CrmClerk DEV
Government Accountability Board

Voter
ERIN GEIGER

Voter Registration Number: 0000182464
Birthday: 12/20/1919
Owner: CITY OF SUN PRAIRIE

Voter Registration Status: Active
Voter Registration Status Reason: Suspended (4 Years Notice)
Registered On: 11/18/2004

Mailing ID: 12389577

Status: Active

Reason: Suspended (4 Years Notice)
4 Year Maintenance
Suspended (4 Years Notice)

Save & Close

7. Above the data grid, click on the **X** in the **Search for records** field and return to Step 3 and repeat.

Voters Search Results

12389577

Full Name	Voter Registration...	Mailing ID
GEIGER ERIN	0000182464	12389577

Special Situation – Deceased Voter

If there is a note on the postcard that the voter is deceased, follow up to see if you can find an obituary for the voter, or see if that voter is listed in the Death Record matches in the Voter Matches node – see the HAVA Interfaces chapter for more information on Death Matches.

You may also ask for a letter of testament from a family member. If you verify that the voter is deceased, you can open their voter record in SVRS and mark them as **Cancelled – Deceased**. You should only mark a voter as deceased if you have reliable information. (A hand-written note by an unknown person on a postcard may not be reliable.)

Postcard Returned for Continue Registration – Returned by Voter

Locate **4 Year Maintenance** on the main screen menu under **Workplace**.

1. Click on **Voters**.
2. Change the view **My Active Voters** drop-down to **4 Year Maintenance – Active Suspended**. (The Active Suspended view allows users to monitor how many voters records need to be processed.)
3. Click in the **Search for records** field and enter the Four-Year Maintenance **Mailing ID**. The mailing ID number can be entered manually or scanned in from the postcard with a barcode reader. If you enter the number manually, you must then hit **Enter** on your keyboard to search the records. (Voter last names & registration numbers can also be searched.)



When you begin recording the mailing using a bar code scanner (or the keyboard), be sure to click inside the **Search for records** field.

4. Click on the voter's name to access the voter record.
5. A new window will open with the voter record. Change the **Reason** from Suspended (4 Years Notice) to **Registered**.
6. Choose **Save & Close**.
7. Click on the **X** in the **Search for Records** field and return to Step 3 and repeat.

Voter: GEIGER ERIN - Microsoft Dynamics CRM - Windows Internet Explorer provided by State of Wisconsin

http://www.mad01627.svrs.wisstate.gov/GAB/main.aspx?etc=2&extraqs=%3f_gridType%3d%26etc%3d%26id%3d%257bC77EBDD7-5593-E211-80F8-0050568C2EE9%257d%26pagemode%3diframe%26prel

Wisconsin Election Management System

CrmClerk DEV Government Accountability Board

Voter

ERIN GEIGER

Voter Registration Number: 0000182464
 Birthday: 12/20/1919
 Owner: CITY OF SUN PRAIRIE
 Voter Registration Status: Active
 Voter Registration Status Reason: Suspended (4 Years Notice)
 Registered On: 11/18/2004
 Mailing ID: 12389577

Status: Active

Reason: Suspended (4 Years Notice)
 4 Year Maintenance Registered
 Suspended (4 Years Notice)

4 Year Maint

Special Situations – Returned Postcards

As you are processing postcards in CRM, you may encounter certain situations that require you to update the voter's record in SVRS. The following are the SVRS procedures for these situations.

The Voter's Record is Already Active – Registered

This voter was already reactivated because he or she voted, re-registered, or for some other reason. Leave the voter record as **Active**, and make sure the **4 Year Voter Record Maintenance** comment has been removed. **Save and Close** the record.

The Voter Has Crossed-off the Printed Name or Address and Written an Update on the Postcard

First, search the Voter node statewide to see if the voter has an updated voter record at the new name or new address. It's a good idea to include **Cancelled/Non-Valid Voters** in your search.

- **If the name is misspelled, or there is a typo in the address, you may correct the voter record.** If there are two separate records because of the typo, you must merge the two records together. See the Voter chapter for directions on how to merge duplicate voter records.
- **If the name or address has changed, the voter must reregister.** If you wish, you may send a mailing to the voter telling them they need to reregister, and enclose a voter application form.
- **If the name or the address has been changed on the card, and you discover the voter is already Active – Registered at the new name or address they provided to you,** the card was sent to a duplicate voter record. Merge the two voter records together. If the voter has moved, and now lives at a new address outside your municipality, call the GAB Help Desk for assistance with the merge.
- **If the address has been changed to an out-of-state address,** check the voter's record for a mailing address. If the address listed on the postcard matches the voter's current mailing address, you may record the mailing as returned and change the voter's status to **Active – Registered**. If the out-of-state address provided does not match the voter's current mailing address, record the mailing as undeliverable.

Special Situations (cont.)

The Voter Has Not Signed the Postcard

If they request to remain on the registration list, but without a signature, the renewal request is not valid. Do not record the mailing as returned. The voter will be inactivated after the 30 day period has passed. You may attempt to contact the voter to let them know that they must re-register, but this is not required.

The Voter Responds by Phone

Again, without a signature, a request for renewal is not valid. Have them return the postcard or fill out a new registration form.

Un-record a Mailing Recorded in Error

Any Four-Year Maintenance voter record can be easily retrieved and edited.

1. If you have recorded a mailing in error, enter or scan in the mailing ID number into the **Search for records** field. Click **Enter** on your keyboard. (You can also search by Name or Voter Registration number.)
2. Click on the voter name to access the voter record.
3. Modify the **Reason** drop-down to record the mailing correctly.
4. Choose **Save & Close**.

Four Year Search

The 4 Year Search is another way of processing postcards. It allows you to enter the **mailing ID, voter name, or voter registration number**. If the search is unique to one voter the Voter Record will automatically open.

1. Click in the **Search Field**.
2. Enter the **Mailing ID**

(When the search is unique, the Voter Record will automatically open; if the search is by name, it is more likely to have multiple entries and then a list will appear. Click the name to select the voter from the list).

Workplace

- Extensions
 - Voter Mailings
- Ineligible Voters
 - Ineligible Voters Dashboa...
- Provisional Ballots
 - Provisional Tracker System
 - Provisional ballots
 - No Provisional Tracker
- Absentee Ballot
 - Absentee Ballot Trackers
- Ballot Preview
 - Preview Absentee ballot
- 4 Year Maintenance
 - Voters
 - 4 Year Search

Process Returned Postcards

Four-Year Maintenance postcards will either be returned by the post office because they are undeliverable or returned registered.

1. Enter the postcard mailing ID to search for the voter record.
2. If the postcard is returned undeliverable: Change the Reason in the voter record from **Suspended (4 Years Notice)** to **4-Year Maintenance**. This will automatically change the voter registration status to **Inactive**.
3. If the postcard is returned with a request for continued registration: Change the Reason in the voter record from **Suspended (4 Years Notice)** to **Registered**. This will automatically change the voter registration status to **Active**.

*Damaged or lost postcards can be replace with this sample Notice. This attachment can be modified to include your con
Please pre-fill the voter's name and address before sending the Notice."
[Letter Notices of Suspension and Application for continuation](#)

Search for records

3. Change the Voter Registration Status **Reason** drop-down.
4. Click **Save & Close**.
5. Click **Clear** and click in the search field.

Identify Four-Year Maintenance Voters

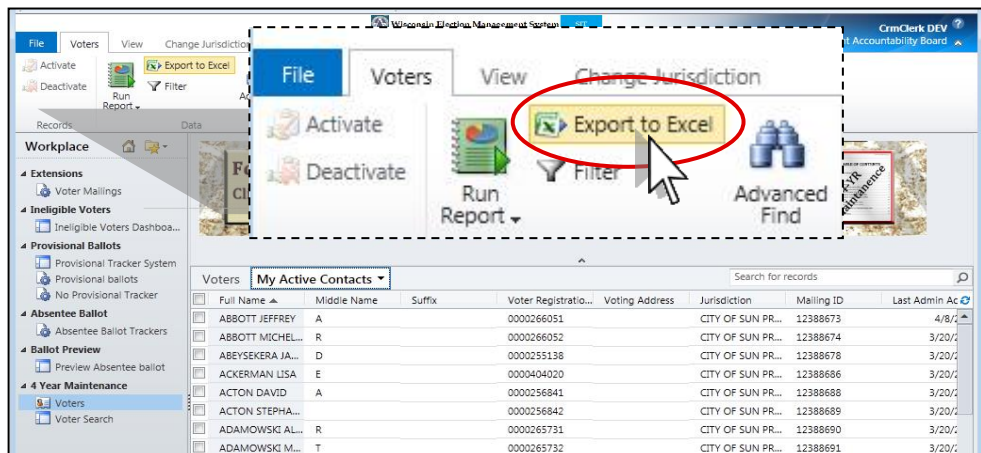
Export a **My Active Voters** spreadsheet to identify all the voters who were sent a postcard. Reports can also be exported for the other views. The **My Active Voters** data is all-inclusive reflecting all the voters reconciled as **Four Year Maintenance–Inactive** or **Registered–Active** or voters that are still listed as **Suspended (4 Years Notice)**. You can now work within Excel to review or print your Four-Year Maintenance data.

1. Change the view to conform to the list you wish to export.

- 4 Years Maintenance – Active Suspended
(Voters who received postcards and not reconciled)
- 4 Years Maintenance – Inactive
(Post Office returned or unreturned postcards)
- My Active Voters
(All postcard recipients)
- Registered – Active
(Voters who requested to remain active)

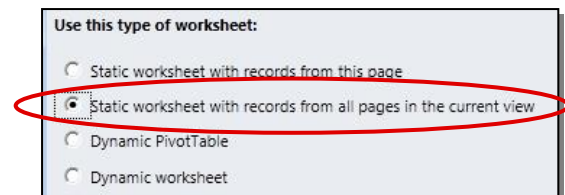


2. Click on **Export to Excel**. (If any pop-up blocker messages appear – Click **OK**.)



3. **Export Data to Excel**

- Change type of worksheet to “...all pages”
- Click **Export**.



- Choose **Save**. This will download the file to your computer's **Download** folder.
- Click **Open Folder**.
- Open the **My Active Contacts.xls** file.
- An Excel security message will appear – Click **Yes**.

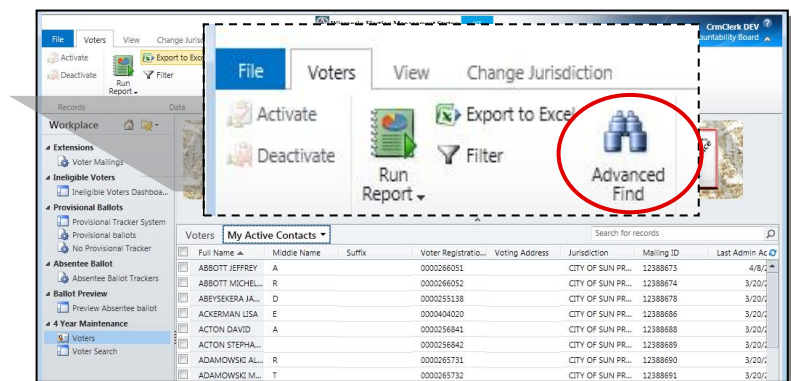
Providers / Relier Reports

Providers can create Relier Reports with CRM's Advanced Report.

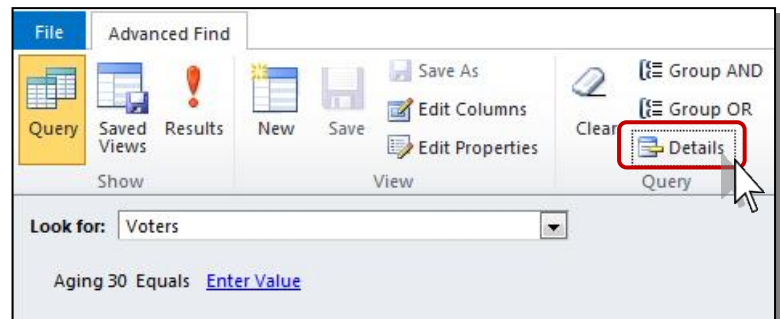
1. Verify the system view is **My Active Voters**.



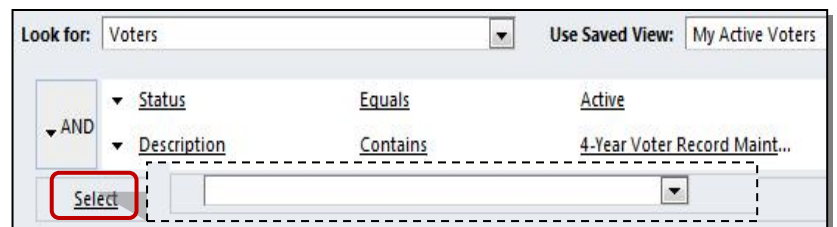
2. Click **Advanced Find**.



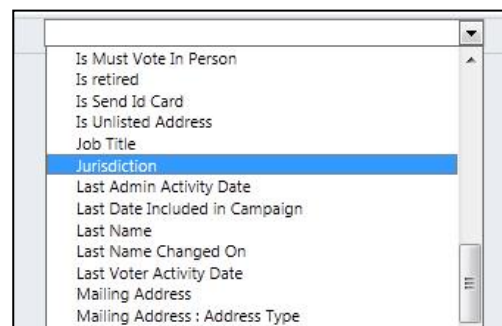
3. Click **Details**.



4. Click **Select** link.
A new drop-down field appears.



5. Click the drop-down and select **Jurisdiction**.



6. Click the **Enter Value** link.
A new drop-down field appears.

7. Type a Relier municipality.
8. Select **Enter** on the keyboard.

The Look Up Records web dialog page opens.

9. Click the Municipality.
10. Click **OK**.

11. Click on **Results**.

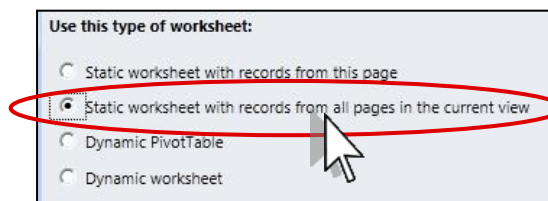
12. Click on **Export to Excel**. (If any pop-up blocker messages appear – Click **OK**.)

Full Name	Middle Name	Suffix	Voter Registrati...	Jurisdiction	Mailing ID	Last Admin Acti...	Voter Reg S
BALLWEG AMA...	MARIE		0708989720	TOWN OF ROX...	12957747	4/12/2013	Suspended
BREUNIG LUCAS	M.		0000959305	TOWN OF ROX...	12957748	4/12/2013	Suspended
BREUNIG MAR...	M		0708989860	TOWN OF ROX...	12957749	4/12/2013	Suspended

13. **Export Data to Excel**

– Change type of worksheet to “...all pages”
(if “... all pages” is not an option leave default).

– Click **Export**.



14. Choose **Save**. This will download the file to your computer's **Download** folder.

15. Click **Open Folder**.

16. Open the **My Active Voters.xls** file.

17. An Excel security message will appear – Click **Yes**.